Composable Infrastructure Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The composable infrastructure market is expected to record a CAGR of 24.84% during the forecast period. Composable infrastructure refers to the IT infrastructure formed by disintegrating various components such as compute, networking, and storage of the data center infrastructure and integrating them in different ways per the needs of specific workloads. Major factors expected to drive the growth of the composable infrastructure market are rising business analytics workload, increased customer expectations, implementation of methodologies such as DevOps, the rise of automation and standardization tools, and the increasing adoption of hybrid cloud.

Key Highlights
The conventional siloed IT infrastructure cannot provide the flexibility required by the modern world's enterprise-critical applications. Additionally, an increasing number of IT firms are shifting to the DevOps methodology for application development, which needs an agile framework to keep up with the rapidly evolving application requirements and often uses an "infrastructure as code" methodology to optimize resource allocation.
A composable infrastructure turns "infrastructure into code" with the help of an easy-to-use API. For a large enterprise, the infrastructure as a code solution delivered efficiency to the IT infrastructure team with ease and agility to deploy. For instance, in May 2020, DivvyCloud released a new Infrastructure as Code (IaC) security solution. This capability enables cloud security in the DevOps process, which improves the developer's productivity and prevents security issues during the build process. DivvyCloud offers seamless, full-lifecycle cloud security with this newly developed solution, ensuring that the customers can accelerate innovation using cloud services without losing control.
Flexible and scalable app development requires a framework that leverages accelerators like reference architectures, blueprints, management tools, and the native composable fabric of composable infrastructure. For example, Wipro's "FluidIT framework," consisting of Service Theater, ASPIRE, and composable infrastructure, delivers a programmable infrastructure ecosystem that

builds the foundation of a software-defined datacenter and hybrid cloud.
To deploy a safe composable infrastructure, vendors follow methodologies like establishing a root of trust (RoT), encrypting data at rest and in transit, etc. For protection against cyberattacks, which can exploit the full firmware and network servers, it is necessary to establish a root of trust (RoT) that prevents servers from malicious firmware code. For example, significant vendors like Dell EMC and HPE use an RoT embedded in their hardware by creating an unmodifiable fingerprint in the silicon. This will prevent servers from booting up unless their firmware matches the fingerprint.
At the time of the COVID-19 pandemic, technology vendors support organizations across all potential industries with their innovative composable infrastructure solutions. First, Technology Inc., in a strategic alliance with Hewlett Packard Enterprise, can enable any size business to optimize its current IT infrastructure, particularly considering the harsh economic times.
In this daunting time when organizations struggle to keep up with their regular infrastructure needs, Pramerica Life Insurance company has achieved a milestone of 99% uptime in a stable and flexible composable infrastructure. These increasing use cases of composable infrastructure at the time of the COVID-19 situation will further boost the market growth.

Composable Infrastructure Market Trends

IT and Telecom Vertical is Expected to Grow at a Significant Rate Over the Forecast Period

IT and telecom enterprises are willing to accelerate their apps, data, and innovation in the current scenario. It needs to manage conventional bare-metal and virtualization applications more efficiently while supporting containerized applications with software-driven automation and a fluid pool of resources that may flexibly custom fit the specific requirements.
As tech firms transition from a software-defined data center to an autonomous one, IT teams must put the insights gathered about the infrastructure and workloads into insights-driven actions to ensure a consistently fast environment.
The segment growth may be attributed to the high concentration of OTT providers like Netflix and Amazon Prime. Data security is a critical concern for these OTT providers as they regularly handle large terabytes of data. Additionally, these OTT providers must maintain data quality and ensure business continuity. Therefore, they develop a data quality framework to align the data quality per the existing policies and adopt composable infrastructure for unified integration.
However, composable infrastructure providers like Liqid Inc. offer a low-latency PCIe fabric to connect FPGA pools, GPUs, CPUs, NVMe storage, and Intel Optane non-volatile memory.
The IT customers may orchestrate balanced systems for each artificial intelligence (AI) phase of data ingest, tagging or cleaning, training, and inference while minimizing the infrastructure footprint. The primary technology providers are expected to help boost the segment's growth in the future by introducing these innovative offerings for the IT and telecom sectors.

North America is Expected to Hold a Significant Share Throughout the Forecast Period

The North American region dominates the composable infrastructure market, with the United States occupying a significant market share. The region's dominance is the presence of leading composable infrastructure solution providers, such as Cisco, Juniper Networks, Liqid Inc., Nutanix Inc, and Hewlett Packard Enterprise. These players focus on partnerships, mergers and acquisitions, and innovative solutions to stay in the regional and global competitive landscapes.
The growing number of SMEs and concerns over increasing the infrastructure's efficiency in computing, storage, and network fabric resources are some of the major drivers of the market. According to a report published by CBRE (real estate and service provider) in H1 2021, the demand for space in data centers rose as wholesale colocation inventory topped three gigawatts in primary markets, with providers bringing 214.3 megawatts of new space online.
Event-Driven Architecture, or EDA, is a new phenomenon adopted by leading enterprises, which complements market growth. In

such an API, an event triggers a serverless function that scales up and down the resource requirements as needed. Further, a report by Coleman Parkes, sponsored by Solace, found that 72% of global organizations take advantage of event-driven architectures.
The market is also witnessing potential product innovations in intelligent data processing solutions to create a stronghold for digitized enterprises in the cloud business interface. For instance, in April 2021, NVIDIA announced the launch of NVIDIA Bluefield-3 DPU, its next-generation data processing unit, to deliver the most powerful software-defined networking, storage, and cybersecurity acceleration capabilities available for data centers.

Composable Infrastructure Market Competitor Analysis

The composable infrastructure market is moderately competitive and consists of a significant number of global and regional players. These players account for a considerable market share and focus on expanding their client base worldwide. These players focus on research and development activities, strategic alliances, and other organic and inorganic growth strategies to stay in the market landscape over the forecast period.

August 2021 - Australian container terminal operator Patrick Terminals hired tapped Sydney's managed services provider, Vectec, to upgrade its IT infrastructure. Vectec deployed multiple solutions from Hewlett Packard Enterprise to update Patrick Terminals' private cloud, storage, backup, and networking capabilities through the vendor's GreenLake edge-to-cloud platform.
June 2021 - Petrobras launched Latin America's largest supercomputer as part of its plans to reach 40 petaflops of in-house computing capacity by the end of 2021. Algorithms developed by geophysicists and analysts will be used in exploration projects, especially in areas of interest for oil and gas development, production process optimization, and significant reductions in processing.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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